

CUSTOMER BASE SUGGESTS ONLINE GROCERY GROWTH

SURVEY: SALES FALL, PER-ORDER SPEND RISES

Despite a drop-off from a June peak, U.S. online grocery sales are nearly five times what they were a year ago, according to the the **Brick Meets Click/Mercatus Grocery Shopping Survey**.

Sales from online grocery delivery and pickup services came in at \$5.7 billion in August, down 20.8% from \$7.2 billion in the previous survey in June but up 475% from \$1.2 billion in August 2019. The study, conducted Aug. 24-26, polled 1,817 U.S. adults.

Brick Meets Click said the August online grocery sales decline, in part, reflects changing shopper attitudes about **COVID-19**. The strategic advisory firm noted that its ongoing research has tracked a steady decline in the percentage of households expressing a high level of concern about catching the virus, from a high of 47% in April to 38% in August.

However, average order value for online grocery sales hit a record high of \$95 in August, up 13% from \$84 in June and eclipsing the previous high of \$90 in May. What's more, 75% said they're extremely or very likely to use online grocery delivery and/or pickup again within the next 30 days, up from 57% in June and 43% in March, when the coronavirus pandemic was declared a national emergency.

Based on the August data, about 37.5 million people — or 29% of all U.S. households — are considered monthly active users of online grocery delivery and pickup services, compared with 16.1 million a year ago. Though down from an apex of 45.6 million customers in June, the August year-over-year increase marks a 133% gain in the number of active households placing at least one delivery or pickup order in the past month.

Similarly, active shoppers placed an average of 1.6 orders in August, up from 1.0 a year ago yet down slightly from a high of 1.9 orders in June.

Increased order frequency and basket size, plus the larger user base, versus a year ago indicate that improved retail conditions are driving stronger online grocery shopping experiences, according to Brick Meets Click and Mercatus, a Charlotte, N.C.-based digital shopping solution provider.

"The rise in repeat purchases and spending means grocers are successfully acquiring new online shoppers and, equally as important, converting existing digitally engaged customers," according **Sylvain Perrier**, president and CEO of Mercatus. "Even with diminished concern about COVID-19, grocery shoppers are realizing the benefits of a streamlined and frictionless online shopping experience. Going forward, it's critical that grocery executives focus their teams on rewarding online shoppers by delivering a differentiated e-commerce experience that caters to consumers' high expectations."

Total online orders (covering the previous 30 days) were 59.5 million in August, down from a high of 85 million in June but up about 370% from 16.1 million in August 2019.

ADVERTISER NEWS

Demand for home goods is still on the up and up, based on the quarterly results published by home furnishings retailer **RH**. RH, formerly known as **Restoration Hardware**, posted a top- and bottom-line beat in its fiscal 2020 second-quarter report as the company capitalized on the stay-at-home environment, CEO **Gary Friedman** tells **CNBC**. "There's clearly, you know, a consumer shift that's happening and you know people are holed up at home," he said. RH reported revenue of \$709 million in the quarter ended Aug. 1, a 0.4% tick up from a year ago, but a turnaround from the 20% revenue decline the company saw in its first fiscal quarter...

Tractor Supply will join with the **American Connection Project Broadband Coalition** to fuel growth of access to high-speed internet in rural communities. The retailer will donate \$1 for every download of its mobile app, with a maximum of \$1 million... **J. Crew Group** has emerged from its Chapter 11 bankruptcy reorganization with **Anchorage Capital Group** as its new majority owner, a \$400 million term

loan and a \$400 million credit facility. The fashion retailer aims to grow with a focus on curating a selection of iconic styles, strengthening customer relationships and creating a more seamless shopping experience, CEO **Jan Singer** said... For those keeping score, it's **Sears 32** and **Kmart 28**. That's the latest count of the number of remaining stores each brand still operates and that are not currently available for lease as of last week. Those numbers include stores that may still be open but have been placed on the auction block by parent company **Transformco**, controlled by long-time Sears owner **Eddie Lampert**. The total of 60 compares with about 450 in February of last year, when Lampert bought the former **Sears Holding** out of bankruptcy, and it compares with more than 1,000 Sears and Kmart stores as recently as two years ago... **Chewy** reported a better-than-expected 47% increase in sales during Q2 as pet parents went online to buy. The retailer posted a loss of \$32.8 million during the quarter compared to an \$82.9 million loss for the same period in 2019... Lease-purchase specialist **Aaron's Inc.** predicts Q3 consolidated revenues will be between \$1 billion and \$1.02 billion and non-GAAP earnings per share will fall between \$1.40 and \$1.50. More than half of the revenues, or between \$575 million and \$585 million, are expected in the **Progressive Leasing** segment in the third quarter ending Sept. 30. Year-over-year invoice growth for Q3 is expected to be in the low-to-mid single-digit percentage range, which the company said is higher than Q2 2020. **Papa John's** is expanding its footprint in the Northeast as sales surge during the coronavirus pandemic with more consumers staying in and ordering out. The company has announced a deal in which franchisee **HB Restaurant Group** will open 49 new locations in Philadelphia and southern New Jersey by 2028. It's one of Papa John's biggest such deals in two decades.



ABC, CBS PRIMETIME SCATTER PRICES PLUNGE

CBS and ABC suffered lower primetime scatter pricing in the spring and summer 2020 periods due to the cancellation or postponement of major sports events as a result of the COVID-19 pandemic, MediaPost reports.

CBS had to go without the **NCAA's Men's Basketball Tournament** (March-April) and **The Masters** golf event (April). ABC had to do the same with **NBA Finals** (June).

In April of this year, CBS' average primetime scatter pricing was \$107,308 vs. \$144,905 in April a year ago, while ABC's scatter pricing was \$56,916 in June of this year vs. \$112,334 in June 2019, according to **SQAD MediaCosts-National**, which collects media agency and brand pricing data.

Apart from this, scatter TV network pricing during the five-month pandemic period of March through July followed a similar downward trend for those months.

Starting in March of this year, the average 30-second primetime scatter price among ABC, CBS and **NBC** in terms of scatter pricing was \$108,494 (March), \$106,399 (April), \$102,006 (May), \$67,681 (June) and \$56,568 (July).

The year before in 2019, the average 30-second primetime price was \$89,453 in March, \$108,285 (April), \$89,452 (May), \$80,486 (June) and \$56,068 (July).

NETWORK NEWS

The primetime matchup between the victorious **Kansas City Chiefs** and the **Houston Texans** on Thursday night snared 19.3 million viewers on **NBC**, Deadline reports. That's a decline of 12.3% from the **Green Bay Packers-Chicago Bears** opening game of the 2019-2020 season on Sept. 5, 2019. The game was up just a touch over the nine-year low of the weather-delayed 2018 season opener in total sets of eyeballs. Additionally, there were both **NBA** and **NHL** playoffs on the air, most noticeably with the **Los Angeles Lakers** beating the **Houston Rockets** in NBA action. When data from **NBC Sports Digital** and **NFL Digital** platforms are added to Chiefs-Texans, the game had a total audience of 20.3 million. That's an 11% drop from last year, even with the digital numbers up 55% over 2019 to a non-**Super Bowl** high. The game peaked at 22 million viewers early in the 9:15-9:30 PM (ET) slot.

COULD APPLE TV+ BUNDLE BOOST GROWTH?

Apple's bundling of **Apple TV+** with **CBS All Access** and **Showtime** for just \$9.99 per month, announced in August, could be a savvy move, according to research firm **Interpret**.

Apple TV+ alone is \$4.99 a month.

Interpret's **New Media Measure** shows that Apple TV+ has room for growth with the bundle method. Among current Apple TV+ subscribers, only 7% subscribe to Showtime streaming and 13% subscribe to CBS All Access.

"Both CBS All Access and Showtime were already available in the Apple TV channels lineup, but considering that Showtime costs subscribers \$10.99 monthly and CBS All Access subscriptions go for \$5.99, Apple is banking on the bundle approach as too irresistible for content-hungry fans — not unlike **Disney+** offering a bundle with **ESPN+** and **Hulu**," according to Interpret.

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TVB: BROADCAST 'BLACK PANTHER' TOPS CABLE

A new **TVB** analysis of audience impressions from the TV airing of **Black Panther** found that broadcast TV overwhelmingly reached more viewers than cable, despite the fact that the movie was generally aired at the same time.

This special tribute was held by **ABC** and **TBS** in honor of **Chadwick Boseman**, the Black Panther star who last month died of cancer at the age of 42.

TVB, the non-profit trade group that promotes the local broadcast industry, says that overall ABC stations combined to deliver 3.734 million households, compared to the 440,000 delivered by TBS — making the broadcast audience more than eight times that of cable.

In New York alone, the top ABC market (**WABC**) delivered 404,000 households, almost equal to the entire 56-metered market TBS household total.

For the analysis, TVB used Live+1-day currency for Sunday household impressions for the ABC stations in the 56 **Nielsen**-metered markets, and the Sunday performance on TBS.

"Not all TV is created equal. Time and time again, the data proves local TV drives greater engagement and audience action compared to that of other platforms," said **Hadassa Gerber**, TVB's chief research officer. "Local broadcast TV offers higher reach compared to cable TV. At a time when marketing budgets are strained, getting a return on advertising is critical to drive economic recovery."

ABC and TBS aired the movie the weekend of Aug. 29-30. TBS aired the movie on Saturday (Aug. 29) at 9 PM (ET), and again Sunday at 8 PM, both with commercial breaks. ABC also aired the movie on Sunday at 8 PM.

COVID: A STIMULANT FOR RV/MOTORHOME SALES

RVs and motorhomes are like staying in your home and getting away. They're the perfect answer for consumers who are keeping their social distance, flying less and not staying in hotels. As a result, RV sales are enjoying a strong upswing as a result of **COVID-19**.



"A lot of first-time buyers," notes **Tim Conder**, an analyst at **Wells Fargo**. "Dealers are saying as high as 80% of customers are first-time buyers... vs. the typical 25% mix."

"The surge in RV/Motorhomes is a great opportunity for TV," says **Jeff Stein**, market manager for **The Media Audit**, "because TV has such a strong story to tell. TV reaches 93% of RV/Motorhome owners, and they spend 4+ hours a day watching TV... more time than any other medium."

The Media Audit's online study across 57 markets shows people who own an RV/Motorhome watch TV throughout the day and peak in primetime. "Since the audience is spread out so evenly across the day, the dealers are well advised to buy a multiple daypart schedule," suggests Stein.

The survey shows demographically two-thirds of RV/Motorhome owners' families equally split between three- and four-person households, and five or more person families. Five percent are one-person households, and 28% are one- or two-person households.

"In the past, one- or two-person households tend to watch about half an hour more TV than families," says Stein. "That's because there are a lot of retirees. But with all the first-time buyers entering the market, we believe that viewer profile will change."

BLOOMBERG TO SPEND \$100M IN FLA. FOR BIDEN

Former New York mayor and ex-2020 presidential candidate **Mike Bloomberg** is slated to spend \$100 million in Florida to help Democratic nominee **Joe Biden** win the state, **CNBC** reports.

The money "will be used to turn out voters for former Vice President Biden in Florida" by financing television and digital ads in both English and Spanish, a spokeswoman for Bloomberg told **NBC News**. The latest financial push gives the Biden camp more flexibility to spend money in other key states, like Pennsylvania, Nevada and Minnesota.

The move may also put pressure on Republicans and the Trump campaign to spend more in Florida, leaving less money to spend elsewhere.

In August, Biden eclipsed Trump's re-election campaign and raised a colossal \$364 million compared to the president's re-election campaign raising \$210 million. So far this year, the Trump campaign has spent more than \$800 million, according to **The New York Times**.

Trump and Biden are in a dead heat in Florida with 48% support each among likely voters, according to a recent **NBC News/Marist** poll. Trump was leading among Latinos, while Biden was doing better among seniors than **Hillary Clinton** in 2016. Trump leads on the economy, while Biden performs better on responding to the pandemic and race relations.

TUBI: 25% OF SUBS DITCH SVOD, TURN TO AVOD

Tubi, Fox Corp.'s ad-supported VOD service, last week released new data underscoring what it says is a rise in popularity of so-called "free streaming" or ad-supported video-on-demand services, **Media Play News** reports.

Citing data from research firm **OnePoll**, Tubi said 25% of survey respondents have dropped a SVOD streaming service in favor of AVOD in the past few months. In addition, 37% surveyed said they would try a new streaming service with ads to discover new content. The OnePoll online survey polled 2,000 people nationwide from Aug. 7-12.

Tubi, which Fox acquired this year for \$440 million, said the pandemic has caused financial difficulties resulting in 33% re-evaluating subscription streaming services. To save money, 25% started a free trial and canceled it before paying the subscription fee, with the average person who employs this tactic doing so three times.

Meanwhile, 17% have shared passwords to gain access to streamers they don't subscribe to, with 38% of those 18-24

and 31% of 25-34 swapping passwords.

The survey also showed that streaming has continued to boom with social distancing practices still in place, with 52% stating that they streamed more than they would in a typical summer due to stay-at-home restrictions with **COVID-19**. Over the past two months alone, the average person has binged four shows and watched 20 movies.

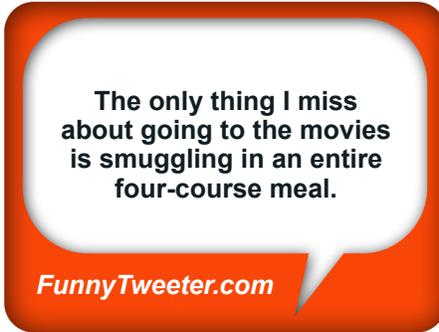
U.S. CONSUMER PRICES REBOUNDED IN AUGUST

U.S. consumer prices rose in August due to higher costs for a range of items, a sign of firmer inflation as demand for goods continues to rebound from a coronavirus pandemic-induced downturn, **The Wall Street Journal** reports.

The consumer-price index — which measures what consumers pay for everyday items including groceries, clothing and electricity — climbed a seasonally adjusted 0.4% in August, the **Labor Department** said last week. That marked the third straight month of gains.

Excluding the often-volatile categories of food and energy, so-called core prices increased 0.4%. Economists surveyed by the Journal expected a 0.3% increase for both the overall consumer-price index and the core index.

The bounceback in consumer prices over the summer came as states reopened their economies and weathered a resurgence in coronavirus cases. Prices for certain goods have rebounded especially well, reflecting a shift in consumer habits and preferences amid the pandemic, as well as continued business disruptions and adaptations in many industries.



MONDAY NIELSEN RATINGS - LIVE + SAME DAY

Time	Net	Program	Adults 18-49 Rating/share	Viewers in Millions
8:00	ABC	College Football	0.9/8	3.64M
	NBC	NHL Conference Final	0.4/3	1.51M
	CBS	NCIS: Los Angeles	0.2/1	1.99M
	FOX	MLB Regional	0.3/3	1.35M
9:00	CBS	Love Island: More to Love	0.1/1	0.84M
10:00	CBS	48 Hours	0.2/2	2.24M